

## Assets and Other Resources for Independent Students

\_\_\_\_\_  
 Student Name (Please print)

\_\_\_\_\_  
 CSUID

- ✓ **Complete this form based on information as of the date you originally signed the Free Application for Federal Student Aid (FAFSA).**
- ✓ **If student/spouse have assets owned jointly with someone else (ex: business partner), report *only* your/your spouse's portion of the net worth.**
- ✓ **All boxes must have a value. Write "0" or "N/A" if none. (If no spouse, indicate N/A).**

STUDENT		SPOUSE
\$ _____	<b>Cash, Savings, and Checking Accounts</b> – Report total balance of cash, savings, and checking accounts	\$ _____
<b>Real estate:</b> (Do not include the value of the primary home)  \$ _____  <b>Rental property:</b> \$ _____  <b>Trust Funds:</b> \$ _____  <b>Stocks or bonds:</b> \$ _____  <b>Other investments:</b> (Please specify type) _____  \$ _____  <b>Total of student investments:</b>  \$ _____	<b>Net worth of investments</b> <b>(Net worth = value - debt)</b>  <u>Investment value</u> = the market value of investments as of the date you signed the FAFSA and  <u>Investment debt</u> = only those debts that are related to the investment(s).  <b>Do not include personal or consumer loans, or any debt not related to the investments</b>  <i>*See FAFSA Notes page 2</i>	<b>Real estate:</b> (Do not include the value of the primary home)  \$ _____  <b>Rental property:</b> \$ _____  <b>Trust Funds:</b> \$ _____  <b>Stocks or bonds:</b> \$ _____  <b>Other investments:</b> (Please specify type) _____  \$ _____  <b>Total of spouse investments:</b>  \$ _____

Business Value: \$ _____ Business Debt: \$ _____ <b>Value – debt = Business equity:</b> \$ _____  Name and type of business: _____  Total FT/FTE employees: _____	<p align="center"><b>Net worth of business(es) owned</b></p> <p align="center"><b>Do not include the value of a small business that has 100 or fewer full-time (FT) or full-time equivalent (FTE) employees</b></p> <p align="center"><i>*See FAFSA Notes page 2</i></p>	Business Value: \$ _____ Business Debt: \$ _____ <b>Value – debt = Business equity:</b> \$ _____  Name and type of business: _____  Total FT/FTE employees: _____
Farm Value: \$ _____ Farm Debt: \$ _____ Value – debt = Farm equity: \$ _____  Do you live on and operate the farm listed above? <input type="checkbox"/> Yes <input type="checkbox"/> No	<p align="center"><b>Net worth of investment farm(s) owned</b></p> <p align="center"><b>Do not include a farm that you live on and operate</b></p> <p align="center"><i>*See FAFSA Notes page 2</i></p>	Farm Value: \$ _____ Farm Debt: \$ _____ Value – debt = Farm equity: \$ _____  Do you live on and operate the farm listed above? <input type="checkbox"/> Yes <input type="checkbox"/> No
\$ _____	<p align="center"><b>Housing, food, and other living allowances paid to member of the military, clergy, and others.</b></p>	\$ _____
\$ _____	<p align="center"><b>Veterans non-education benefits</b></p>	\$ _____
\$ _____	<p align="center"><b>Other untaxed income</b></p> <p>This includes workers' compensation, disability, untaxed portions of health savings accounts, etc.</p>	\$ _____
\$ _____  Name of person or source providing funds: _____  Relationship to student: _____	<p align="center"><b>Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.</b></p> <p>This includes money that you received from anyone not reported on the FAFSA, such as grandparents, aunts/uncles, <b>or parent(s)</b></p>	\$ _____  Name of person or source providing funds: _____  Relationship to spouse: _____

All information provided on this form is complete and correct and every field has a value (**write in "0" if none**).

Student Signature \_\_\_\_\_

Date \_\_\_\_\_

Spouse Signature (if applicable) \_\_\_\_\_

Date \_\_\_\_\_